



Policy Manual

As of Sept 2019

The Association of Unity Churches (Canada) registered the branded business name of Unity Canada in 2011.

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Foundational Policy Statement

Unity Canada will follow the policies and guidelines of Unity Worldwide Ministries and Unity Worldwide Spiritual Institute, insofar as they do not conflict with Canadian Federal and/or Provincial Law.

The purpose of Unity Canada is to support excellence in ministry and the growth of the Unity movement in Canada. It is the purpose of Unity Canada to supplement, not duplicate, the services offered by Unity Worldwide Ministries and Unity Worldwide Spiritual Institute. Unity Canada will work cooperatively with both Unity Worldwide Ministries and Unity Worldwide Spiritual Institute to better provide Unity to Canada and around the world.

1.0 International Cooperation Policies

1.1 Purchase of Services Agreement:

The Canada Revenue Agency prohibits any Canadian Registered Charity from sending receipted funds outside of Canada without a valid invoice for goods provided, therefore Canadian member ministries may not send donations directly to Unity Worldwide Ministries or its regions. To assure the continued support and development of Unity in Canada, Unity Canada has entered into a “Purchase of Services Agreement” with Unity Worldwide Ministries. To support this policy, member ministries may designate donations for this purpose to Unity Canada.

All financial support must be sent via Unity Canada and designated to the Purchase of Services Agreement. A note of the specific fund or service may be added. Unity Worldwide Ministries may apply these funds to the General Fund income unless a specific designation is included.

According to CRA regulations, the amount sent out of the country may not exceed 5% of the ministry’s income or \$5000 whichever is lesser, therefore the Unity Canada Treasurer requires a current copy of the ministry T3010 on file to send the donation to Unity Worldwide Ministries. In addition, designated donations under the Purchase of Services Agreement from a member ministry to Unity Worldwide Ministries may not exceed the total undesignated donation to Unity Canada at any time. When the designated gift exceeds regular non-designated contributions to Unity Canada, the designated gift will be held until the member ministry complies by meeting the donation criteria. If this does not happen within twelve months, the donation will be transferred in total to the General Operating Fund of Unity Canada.

The purchased services covered by this policy will include but not be limited to those programs and services offered to all Unity ministries by Unity Worldwide Ministries, and covers the following areas:

- Ministry and Religious Studies Program
- Ordination and Licensing of ministers and teachers
- Employment for ministries and ministers
- Ethics Review System
- Listing of member ministries/credentialed leaders
- Convention representation and voting
- Voting representative on Standards ministry team

Appointment to International ministry teams
Access to youth education services and consultants
(see Unity Canada website for details)

1.2 Serving on Unity Worldwide Ministries Teams

The members of the Board of Directors will serve on teams of Unity Worldwide Ministries as appropriate. The travel and accommodation costs of this responsibility will be covered through annual budget allocations.

1.3 Ethics Review System Program

Unity Canada complies with the Ethics Review System Policies and Procedures created by Unity Worldwide Ministries. The Canadian Regional Consultant maintains connection with any review team that is doing a Canadian review to insure that decisions and plans of actions are consistent with Canadian law.

1.4 Regional Consultant

In order to have (ideally) 2 Ministry Development Consultants serving as Regional Consultants in Canada (one Regional Rep and one Alternate) to help ensure the health and vitality of our member ministries, Unity Canada will provide funds for the training and development of Regional Consultants based on the current Unity Worldwide Ministries requirements for Ministry Development certification. These funds will cover training fees, travel and accommodations, but not meals.

Consulting remuneration:

The Regional Consultant(s) will receive a monthly honorarium of \$500 and administer a yearly budget of \$6000 to cover travel and other ministry development services to Canadian ministries.

In Canada:

The consultant(s) will offer ministry skills/transitional services in Canada with only their hosting (not travel) expenses being covered by the requesting ministry. The negotiated contract will include a generous donation to Unity Canada by the requesting ministry. The donation for ministry skills services will be recorded separately from church love offerings and will not count towards the ministry's Conference Grant.

Outside Canada: Canadian Ministry Skills/Transitional Consultants may negotiate individual contracts with Unity Churches outside Canada and/or as assigned by the Director of Member Services of Unity Worldwide Ministries.

1.5 Applicants to a Ministerial Program

In situations where a person desires to apply to ministerial school but has no minister, an ad hoc team will be formed consisting of the Unity Canada chair, the Regional Representative and another minister who will work directly with the applicant; this team will evaluate the applicant with the Unity Canada chair signing the application if the team so recommends.

2.0 General Operating Policies

2.1 Governance Model

The Board of Directors will make all regular operating decisions and report at least annually to

the membership at the Annual Conference. To compensate for the Canadian geography, Directors' meetings may be held by conference telephone call or other interactive electronic means.

2.2 Communication with Members

The Secretary and Treasurer, or designees, will at least annually update the membership regarding the activities of the Board of Directors. These reports will include a summary of meetings and financial updates. These reports may be sent in conjunction with communications from the Chair, special notices or with notices of meetings.

2.2a Website

Unity Canada will maintain a website with current ministry and group information and links to their websites if available, governance documents, privacy policy, contact information for directors, resources for ministries and individuals, as well as other information that may be deemed relevant.

2.3 Pastoral Care

A Chaplain may be appointed by the Board to ensure that loving pastoral care functions are provided for Canadian credentialed leaders, and these ministry leaders' close loved ones. A Board Member, a Canadian ministry leader or the Chaplain may initiate these pastoral care functions. When Unity Canada learns of a major illness or surgery, transition or other significant life passage of one of the above, a Canadian ministry leader is beginning or ending their Canadian ministry, special recognition for outstanding service to Unity in Canada, Ordination of a Canadian Ministerial Student, or other special purpose, the Chaplain or designate will provide cards, flowers, gifts, and/or money within spending guidelines to be determined by the Board.

On recommendation of the Regional Consultant, Unity Canada may provide Sunday Service support to a minister or member ministry experiencing loss due to a traumatic event.

2.4 Clergy Registration for Marriages

Registration to perform marriages in the provinces and territories of Canada is a privilege. This privilege is given to credentialed leaders under the rights and practices of Unity.

To facilitate the registration of marriage officiants, Unity Canada has adopted the following policy and procedures:

- i. All credentialed Unity leaders in good standing are eligible for registration provided the procedures for such registration are followed.
- ii. It is the responsibility of Unity Canada to make certain that these procedures are given to credentialed Unity leaders for the province/territory in which they are serving.
- iii. Unity Canada's Board of Directors shall appoint a credentialed Unity leader to fill the position of "Unity Provincial/ Territorial Registrar for Marriages" for each province/territory having an active Unity ministry.
- iv. The "Unity Provincial/Territorial Registrar for Marriages" shall be held responsible by Unity Canada for performing the duties of appointment.

See Unity Canada website for Procedures for Marriage Officiant Registration

2.5 Licensed Unity Teacher annual renewal:

2.5a in a ministry with a minister

Licensed Unity Teacher status is granted on a yearly renewable basis. The License and or its renewal must be signed by the minister of the Canadian member ministry where the Licensed Unity Teacher is affiliated. The supervision of the Licensed Unity Teacher is the responsibility of the minister who signs the renewal.

2.5b in a ministry without a minister

Licensed Unity Teachers serving in ministries without ministers may send the completed renewal form to the Regional Representative with a letter asking the Regional Representative to sign the form, accompanied by a letter of request from their Board.

2.5.c. with neither a ministry or a minister

Licensed Unity Teachers serving without a ministry or a minister may send the completed renewal form to the Regional Representative with a letter asking the Regional Representative to sign the form.

2.5d Annual renewal in an alternate ministry

Where a Licensed Unity Teacher is serving in a recognized alternate ministry that does not include an Ordained Unity Minister, the Licensed Unity Teacher may apply to the Board of Unity Canada to have the Regional Representative act as supervisor and sign the renewal.

Any time the Regional Representative signs for the Licensed Unity Teacher, a report must be given to Unity Canada Board by the Regional Representative.

The Licensed Unity Teacher must send a copy of the completed report to Unity Worldwide Ministries and the Unity Canada Licensed Unity Teacher Representative.

2.6 use of the designation “Reverend” for Canadian Unity Ministries

2.6a. For *non-Unity ministers*: An individual who is serving as a Spiritual Leader of a Unity group and was ordained through a recognized seminary program and is involved with the Unity Worldwide Ministries Special Dispensation process may use the title Reverend.”

2.6b For *guest speakers* the title “Reverend” would only be used if they were ordained through a recognized seminary program from a recognized US or Canadian denomination.

2.6c For *congregants* who are ministers from other denominations, their title “Reverend” is not to be used in the Unity ministry.

Rationale for policy: to provide clarity for congregants as to who is an ordained Unity minister in a ministry.

3.0 Financial Policies

3.1 Tithe

Unity Canada will tithe 10% of its income to registered Canadian Charities or qualified recipients approved by the Canada Revenue Agency. The disbursement of the tithe will be approved by the Directors on a quarterly basis.

3.2 Disbursements

All disbursements will be paid within the guidelines of the annual Budget approved by the Board. Extraordinary expenses may be approved by motion of the Directors via a special

meeting. At year end the Board may designate up to 80% of our previous year's net investment income/capital gains on promoting church growth, expansion projects, etc, while maintaining a contingency fund of one year's budgeted expenses.

3.3 Credit Card Use for Board of Directors

The credit card issued to a member of the Board of Directors is to be used for the sole purpose of Unity Canada business as dictated in the Unity Canada Bylaws and Policy Manual. Receipts for all expenses must be submitted on an expense form approved by the Board of Directors to the Treasurer on a timely basis. Immediately upon leaving the board or position of board service for any reason, the member is to return it to the Treasurer of Unity Canada.

3.4 Directors' Insurance

Unity Canada will carry liability insurance covering the corporation and the Directors, including coverage for the Regional Representative, alternate Regional Representative, Licensed Unity Teacher Regional Rep, and Unity Canada Bookkeeper.

3.5 Investment Policy

Unity Canada will invest its funds under the advisement of an investment manager.

3.5.a Reporting and Review by the Treasurer or appointee:

Contact with investment manager as needed

Monthly activity reports

Quarterly itemized statements with a review to monitor the performance of the investments.

Annually a comprehensive portfolio review with adjustments as needed.

3.6 Funds Held in Trust for New Member Ministries

At various times Unity Canada will have the responsibility of holding funds in trust.

To obtain the release of any designated trust funds an affiliated ministry must:

- a) be an approved ministry with Unity Canada.
- b) have a Credentialed Unity Leader and be incorporated

When this happens the following guidelines will be used:

- Funds (including various forms of property and assets) from the dissolution of a member ministry or funds donated and designated to establish a church in a specific region or location will be held in trust for seven years. If, at the end of seven years, there is not an affiliated expansion ministry working within the defined area, the funds will become general assets of Unity Canada for use as the Directors choose.
- Interest earned on trust funds may be used by Unity Canada as part of its budgeted general income and will not accrue to the principal of the donation or trust amount.
- When an expansion ministry attains full ministry status, funds may be released following the submission of a written plan of action by the Board of Directors/Trustees of the new ministry.

3.7 Minister Hiring Assistance:

To qualify for the reimbursement of candidating expenses, a member ministry must be in good standing and have financially contributed regularly to Unity Canada. It is usually advisable for a vacant ministry to have at least two candidates try out. To assist in this, Unity Canada will

consider applications from vacant member ministries to reimburse half of the excursion airfare travel expenses for two candidates, one of whom is accepted as the new spiritual leader. If the ministry has more than two candidates, the reimbursement will be limited to half of the total excursion airfare expenses for the candidate hired and the next lowest airfare candidate.

3.8 Tax Receipting for Emerging Ministries

Groups wishing Unity Canada to issue receipts for income tax purposes must:

- i. Keep all records necessary for Unity Canada to substantiate the issuance of receipts. This includes offering envelopes, records of individual donations, monthly and yearly financial statements, and other data regarding attendance, programs, etc.
- ii. Send monthly reports of income, expenses, minutes, newsletters, activities and attendance to the Regional Representative or their designated sponsor.
- iii. All expenses must be part of a pre-approved operating budget or have special authority of the Regional Representative or designee.
- iv. Year end financial records and statements must be sent to the Treasurer and Unity Canada Bookkeeper by the 15 of January with the requested support documentation in order that the yearly tax receipts may be prepared.
- v. Where practical, standardized forms will be supplied by Unity Canada to simplify the reporting and record keeping process.
- vi. All bank accounts will be operated as “The Association of Unity Churches (Canada) doing business as Unity (name of Emerging Ministry).”
- vii. The Treasurer, or designee, will be one of the signing officers on all accounts operated by the emerging ministry. The emerging ministry will be responsible for procuring the necessary banking resolutions, signing authority sheets, account agreements and signature cards needed by the institution opening the accounts for the emerging ministry. These forms will be signed by the designated emerging ministry members and then forwarded to the Treasurer, or designee, for approval and signing. This process must be repeated each time signing officers for the emerging ministry change.
- viii. It is imperative that the Emerging Ministry understand that under Canadian law the issuance of receipts for Income Tax purposes is considered a privilege, not a right. Any action by a sponsored emerging ministry deemed inappropriate by Revenue Canada may cause the revocation of Unity Canada’s tax status. Therefore, all programs, activities, speakers, advertising, and expenditures of these emerging ministry must be approved in advance by Unity Canada’s Board of Directors or designee.

It is recommended that all member ministries follow these same guidelines when sponsoring a study group.

3.9 Annual Auditing Policy:

A chartered accountant will do an audit every five years (in years divisible by 5) other years, year-end financials to be done by an accountant.

3.10 Remuneration for Canadian teachers teaching Canadian online courses:

When Canadian credentialed leaders are teaching online courses based in Canada, they will receive 85% of the love offerings and Unity Canada will receive 15%.

3.11 Newly Ordained Canadian Ministers

Newly ordained Canadian ministers will be gifted with Conference registration for the Canadian conference following ordination.

4.0 Scholarship/Grant and Education Policy

Our purpose for all scholarships/grants is to support the growth of Unity leadership and the growth of Unity within Canada.

4.1. Ministry Development:

4.1.1. Ministry Grant: An annual grant may be awarded to a ministry (member ministry, emerging ministry or study group) amount and purpose to be determined annually by the Board of Directors.

4.1.2. Field Licensing Program Ministry Grant

General Purpose: To support ministries who are supporting Spiritual Leaders in becoming Unity ministers through the Field Licensing Program.

Eligibility: The ministry must be an active member ministry in good standing with Unity Canada.

Application due dates coincide with the acceptance dates for this program.

Each year, the sponsoring church may apply for a \$1450 grant subject to the Field Licensing Program student successfully completing that year. Application is made each year with a letter from the ministry's Board of Directors to Unity Canada's Board of Directors.

Grant Awards: Immediately following each candidate training in March, the ministry must submit a report to the Treasurer as to the satisfactory status of the Field Licensing Program candidate. The Treasurer will inform Unity Canada's Board of Directors which will in turn generate a cheque of \$1,450 annually to the ministry while their leader is pursuing ordination through the Field Licensing Program.

4.2 Individual Scholarships and Grants (application forms available on Unity Canada website)

4.2.1 Spiritual Education and Enrichment (SEE) Scholarships

Scholarship Awards: Two SEE Scholarships per fiscal year may be awarded.

Eligibility:

Students will have a minimum of 100 SEE credits AND have the intention to complete the SEE Leadership Program or to apply to a Unity ministerial path. *A student is only eligible to receive one SEE scholarship.*

Procedure:

1. Notification of scholarship availability to be sent out to all ministries and credentialed leaders by April 1st by Education Coordinator.
2. Applications to be downloaded from Unity Canada website.
3. Application consists of 2 parts to be returned separately:
 - a) student
 - b) recommending credentialed leader
4. Applications to be returned to Unity Canada Scholarship Chair by June 30.
5. Scholarship Chair and/or committee ranks applications using the Scholarship Point System

(see Unity Canada website) and submits it to the July board meeting for final approval

6. The SEE Scholarship Recipients will receive a \$750 cheque at the annual general meeting (or it will be mailed following the annual general meeting).

7. In accordance with Federal tax laws, all scholarship recipients will receive a T4A form at calendar yearend for cash scholarships and grants where applicable.

4.2.2 Skills Demonstration Seminar (SDS) Grant

Eligibility: Students who have successfully completed their Skills Demonstration Seminar week are eligible for a grant of \$750 Canadian. The recipient is responsible for any applicable income tax.

Procedure: A copy of the letter of successful completion of Skills Demonstration Seminar must be sent to the Treasurer of Unity Canada on receipt of their License. The Treasurer will inform the Board who will then authorize the grant payment.

4.2.3 Northern Light Scholarship for Unity Ministerial Path Students

Eligibility: Students who have successfully completed their course requirements may apply for a scholarship of 25% of eligible expenses (see below)

Procedure:

1. Eligible students will submit receipts and transcripts of Unity Ministerial Path courses and expenses to the Treasurer of Unity Canada within 6 months of successful completion of each course.

2. Eligible expenses: tuition, books, travel and accommodation for Intensive and Licensing & Ordination weeks.

Requirement of Service: Upon graduation and ordination, the scholarship recipient is expected to minister in Canada for 2 years. If the minister chooses not to work in Canada within 12 months following ordination and graduation, all scholarship monies are subject to repayment to Unity Canada. In the event there is not 1) an opening in Canada or 2) no appropriate and suitable match can be made with an existing Canadian Unity ministry, the scholarship recipient can request an exception to this requirement, subject to the approval of the Board of Directors.

4.3 US Dollar Exchange Grants:

Students who have successfully completed SEE Credit Classes, Unity Worldwide Ministries, Ministerial Path Classes, and/or pre-requisite Ministerial path classes, required L & O intensive and Admissions weeks and have received acknowledged written credit, where applicable, from UWSI may submit the form (see Unity Canada website) for reimbursement of the US dollar differential for all expenses incurred excluding food, books, gas and flights where there is an adverse US dollar exchange rate.* Students must accumulate a minimum of CAN\$25 in US exchange differential before submitting a grant application to the Unity Canada Treasurer.

(* An adverse exchange rate is when the Canadian dollar is valued lesser than the US dollar, causing the student to pay what is essentially a premium on the US charge.)

5.0 Conference Policies

5.1 Date and Place

The Annual Conference of Unity Canada will be held at a location and time designated by the Board.

5.2 Standing Conference Team

The Conference Team will consist of a Board member and other appropriate individuals. The Team is authorized to perform the following; determine speakers and their topics; establish the daily conference schedule; determine who invited guests are to be, within the budget approved by the Board of Directors. These decisions are to be approved by the Board of Directors prior to finalization or invitation to speakers or guests.

5.3 Conference Grant

To encourage conference attendance Unity Canada will offer a grant toward registration, travel and accommodation expenses for attendees from a Member Ministry and Credentialed Leaders. The grant will be limited to half of the member's annual undesignated contributions to Unity Canada and will be calculated annually by the Treasurer. The grant claim may not exceed the actual expenses. Receipts must be submitted to the Treasurer following conference with the expense form provided by Unity Canada. Reimbursement cheques will be issued in a timely way.

To qualify for the grant,

- i. A copy of the ministry's current T3010 must be on file with the Treasurer.
- ii. be current with their Unity Canada Membership Renewal
- iii. Attendees applying for the grant must attend all conference meetings including the AGM.

The above conference expenses to the Canadian Conference will be covered for Unity Canada Board Members, the Regional Representative and the Licensed Unity Teacher Representative in accordance with the above guidelines.

5.4 Delegate packets

Minutes, agendas and written reports will be presented to all in attendance either in delegate packets or, whenever possible, sent out in advance of the meetings. To have items included in the agenda, items and support materials must reach the Secretary a minimum of 30 days prior to conference.

6.0 Membership in Unity Canada

6.1 Criteria for full-church status: ministries may be approved for full-church status in accordance with the established policies of Unity Worldwide Ministries, adopted for Canadian charities. (see Unity Canada website)

6.2 Classifications for Canadian Ministries:

- 1. Full Status Ministries** – those ministries that have met the criteria for membership in Unity Canada and Unity Worldwide Ministries.
- 2. Emerging Ministries** – those ministries actively working to achieve full church status in Unity Canada.
- 3. Alternative Ministries** – those ministries recognized as Alternative Ministries by Unity Canada and Unity Worldwide Ministries.

6.3 Suspension of Ministries -- Ministries may be suspended from membership in Unity Canada and therefore Unity Worldwide Ministries in accordance with established policy of Unity Worldwide Ministries (see Unity Canada website)

6.4 Removal of Credentialed Leaders from membership in Unity Canada:

Credentialed Leaders may be removed from membership for any of the following reasons apart from death:

1. Request to be removed.
2. Expiration of ministerial license without ordination.
3. Lapse in Active status of Licensed Unity Teacher
4. Lapse in filing of Annual Membership Renewal.
5. Suspension by an Ethics Case Review Team.
6. Other causes as determined by the Board of Directors.

When a Credentialed Leader wishes to apply for reinstatement he/she will complete an Application for Re-entering Employment or Active Status according to the process established by Unity Worldwide Ministries.